AlarmBiller Release Notes

June 2023

Contents

Enhancements/Features

eForms Shared Data Tables Font Size Control

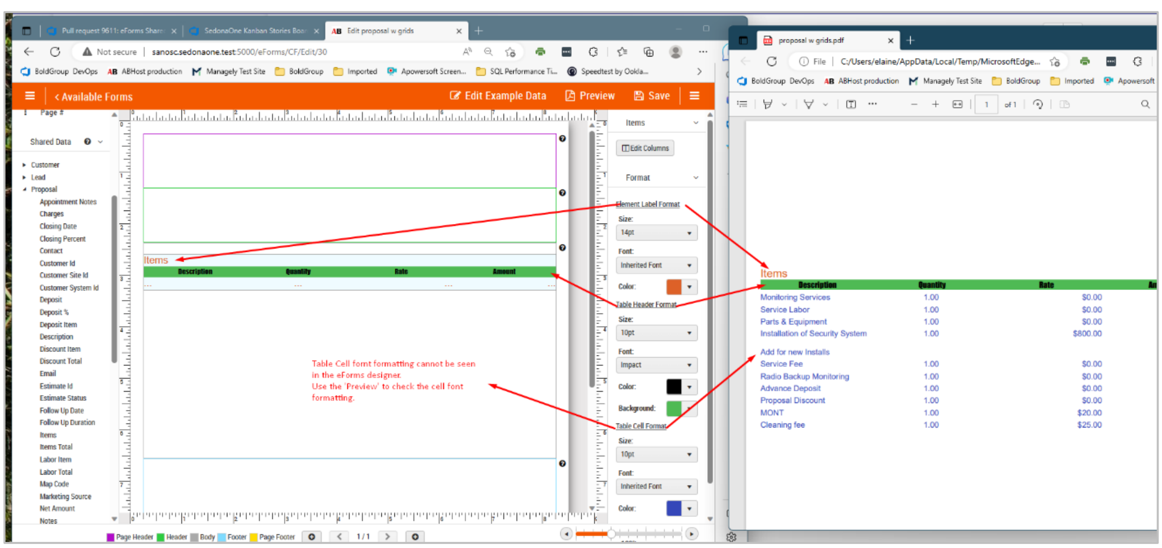
eForms users can now format the font size for three sections of shared data tables (mapped tables) when using the eForms designer to create an eForms template. eForms documents created with these templates will render using any font formats specified for these mapped tables.

The following shared data fields are the eForms elements that have been updated to show font formatting controls in the eForms designer:

- Proposal Charges
- Proposal Items
- Proposal Notes
- Proposal Parts
- Proposal RMRs

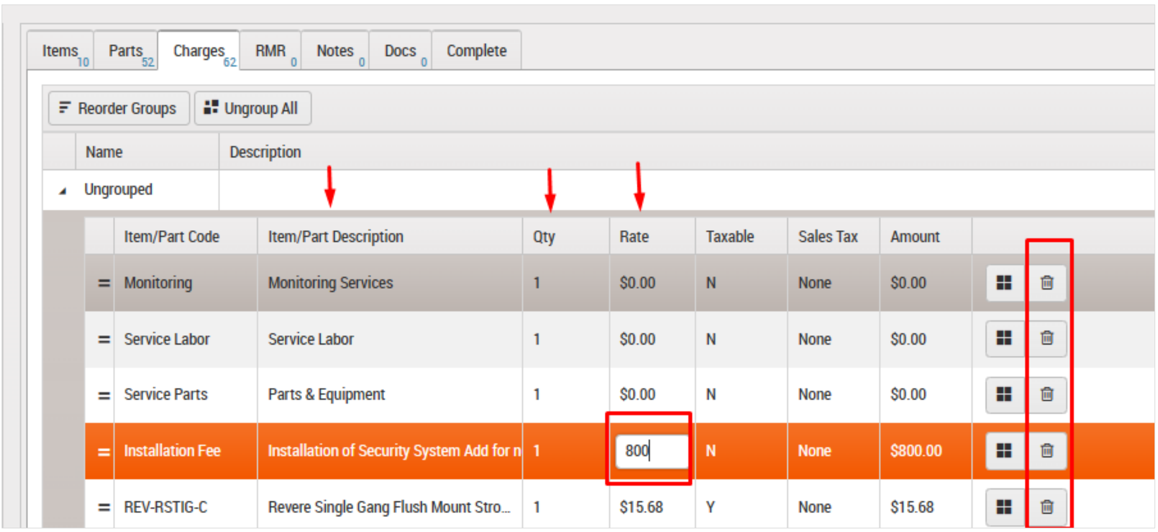
When one of these eForm elements is dropped on the eForms template designer, the right side edit menu will show these formatting controls:

- Element Label
- Table Header
- Table Cell
- Image



(SA) Edit/Delete Items/Parts from Proposal Charges Tab

We changed the Charges tab from read-only to allow users to edit selected fields (Description, Quantity, and Rate) of the items and parts grouped on the Charges tab, as well as allowing users to delete items and parts from the parent entity (proposal) using a delete button on the Charges tab.



When users make changes to an individual item or part by editing or deleting using the Charges tab, those changes are propagated back to the respective original Items/Parts grid, which shows the changes for totals on the parent entity page.

SA Sync Management - customer sync adjustments for deleted SO customers/sites

Sales Automation Customer sync will detect and inactivate in AlarmBiller any SedonaOffice customers/sites/systems that have been deleted from SedonaOffice using the API through an interface other than Sales Automation or by using the 'delete' button in SedonaOffice. This will prevent the customers/sites/systems in AlarmBiller from being used for future Sales Automation leads or proposals.

Also, in Sales Automation when a proposal is sold, there is an initial check to verify that the SedonaOffice customer/site/system that may be referenced by that proposal still exists in SedonaOffice. If not, an error will be shown, and the proposal will not be pushed to SedonaOffice.

This requires SedonaWeb 2.0 version 1.44.0 or higher.

Application Corrections

AlarmBiller

Resolved Issues
Expired Credit Card Email Customer Portal Information The expired credit card email that was sent to customers included information on how to log in to the customer portal, even for dealers that did not use the customer portal. Now, the expired credit card email sent to customers only shows the 'log into customer portal' text and URL if the Dealer Preferences 'Allow Portal' is selected and the generated URL is not blank.
Display issue for Charges Count on Proposal Details View The Proposal Details Charges tab count now reflects the correct number of items configured in the saved proposal.
Have to click the Apply button 3x to get the payment to show Resolved an issue where users needed to select the checkboxes in the vendor payment and vendor bill add and edit view multiple times to complete the full action. Also made a correction so that the Apply Amount value defaults to the Amount Due when a user selects the Apply checkbox.
Customer batch loader - RMR Do Not Prorate is not working Changed the customer import to properly handle duplicate 'DoNotProRate' column names. This allows the Excel row column search to optionally specify a starting column name to locate and then begin the search for the first occurrence of the desired data.
Time and Attendance - Why is work week incorrect? Resolved an issue showing unexpected dates on employee timesheets in the final week of a pay period.

Sales Automation

Resolved Issues
Sales Automation Salesperson Report not displaying all Won Sales Sales Automation Salesperson Report now includes all sales in the Open, Won, and Lost buckets based on proposal status, estimate date, and closing date.
Labor cost only shows on edit screen of proposal In Sales Automation, when editing a proposal with SedonaOffice integration, the labor cost field in the Sales Automation tab, which is populated by the selected SedonaOffice job type, will not show a value until a labor item is selected. Previously, editing would show the labor cost associated with the selected job type even though a labor item was not selected, but when the proposal was saved, the labor cost would be saved with $0. Now, if no labor item is selected, the labor cost shown will be $0, and the proposal will be saved with $0 labor cost.

eForms

Resolved Issues
eForms displaying on incorrect customer site or system Correction for the eForms tab on AlarmBiller Customer Site/System so that it does not list eForms that do not belong to that specific customer site/system.